

Introduction

The “How to Configure Approval Settings and Creating Approval Paths” Quick Reference Guide is designed to provide the minimum steps necessary in configuring your approval path settings and creating approval paths.

Pre-requisites

You must have the Organization Administrator role. Before establishing any approval paths, you’ll first need to set-up how approval paths will function for your Agency.

If you are an Organization Administrator for more than one organization, you can select which organization to maintain by clicking the eyeglass look-up at the top of the screen.

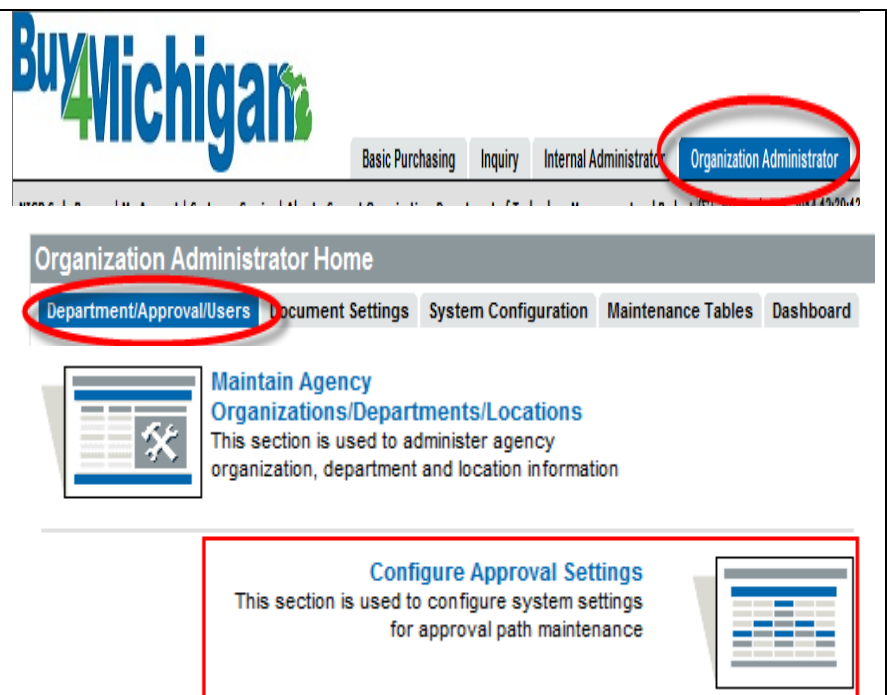
Steps

Step 1:

- a.) From the home screen once logged in, select the **Organization Administrator** tab at the top of the screen.

The page refreshes to the **Organization Admin. Home** page and defaults to the Dept./Approval/Users tab.

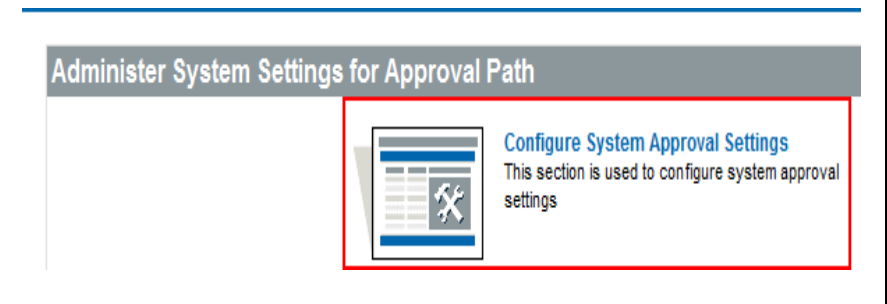
- b.) Click the **Configure Approval Settings** icon.



Step 2:

The page refreshes to the **Administer System Settings for Approval Path** page.

- a.) Click the **Configure System Approval Settings** icon.



Step 3:

- a.) From the dropdown menu for **Cascade Setting**, select which cascade setting will apply to your approvals.

No cascading - user will be able to select only one triggered approval path to apply to the document.

Non-auto cascading - user will be able to select any or all triggered approval paths for the document.

Auto cascading (defaulted) – all triggered approval paths will be automatically applied to the document.

Note: **Allow NIGP code Approval** is defaulted with a check mark. This is used if any of your approval paths will be commodity based (IT equipment).

Maintain Organization Approval Setting for: Department of Technology Manage

Organization

AGENCY - Department of Technology

Cascade Setting

Auto Cascading

No Cascading

Auto Cascading

Non-Auto Cascading

Allow NIGP Code Approval

Allow Account Code Segment Approval

Save & Exit

Save & Continue

Reset

Cancel & Exit

Step 4:

The page refreshes back to the **Administer System Settings for Approval Path** page.

- a.) Click the **Maintain Approval Type Sequence** icon.

Note: This allows you to establish the types of approval paths you'll be setting up, and to give each approval type a priority for use with the cascading feature.

Administer System Settings for Approval Path



Configure System Approval Settings

This section is used to configure system approval settings

Maintain Approval Type Sequence

This section is used to maintain approval type sequence to allow the system to prioritize approval paths in the event of auto cascading approvals.



Step 5:

- a.) Apply an **Approval Type ID**, **Description**, and **Priority** in each field.

Note: you must set-up at least one approval type even if "no cascading" was selected.

The priority will determine the order the approval paths of this type will be triggered from lowest (first) to highest (last).

Maintain Organization Approval Types for: Department of Technology Management and

Organization: AGENCY - Department of Technology Management and Budget

Approval Type ID	Description	Priority
new:		
BUDGET	Budget office Approval	2
DEPT	Dept Approval	1

Save & Exit

Save & Continue

Reset

Cancel & Exit

Example: If release orders must go through Department level approvals, then Budgeting approvals, setup “department” and “budget” as two approval types. Give the department approval type a priority 1 and the budget approval type 2. Then, if both types are triggered by a release order AND the **Auto Cascading** was selected, the document will automatically route to the specified Dept. approvers then go to the Budget approvers.

Step 6:

Once your Agency’s approval settings have been established, you are ready to **Create Approval Paths**.

- a.) Return to the Organization Administrator Home Screen by clicking the **Home** link located in the left corner at the top of the page.
- b.) Select the **Maintain Agency Approval Paths** icon.

Home |

Organization Administrator Home

Department/Approval/Users Document Settings System Configuration Maintenance Tables Dashboard

Configure Approval Settings
This section is used to configure system settings for approval path maintenance

Maintain Agency Approval Paths
This section is used to administer agency approval paths

Step 7:

The **Approval Path Maintenance** page displays any previously created approval paths and provides the ability to edit them.

- a.) Use any of the search fields provided OR choose from the list provided near the bottom of the screen.
- b.) To create a New Approval Path, select the **Add New Approval Path** button at the bottom of the screen.

Approval Path Maintenance for: Department of Technology Management and Budget

Search Using: ALL of the criteria

Approval Path ID Approval Path Name

Organization AGENCY - Department of Technology Management and Budget

Department

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10

Find It Clear

1 2

Add New Approval Path Global Approver Replace Exit

Step 8:

The **New Approval Path** page displays.

- a.) Complete all required and necessary fields in each section.

New Approval Path

General

Change Order

Misc/Freight

Department/Location

Email

Vendor

Summary

Approval Path ID*:

Description*:

Approval Type*:

Organization: AGENCY - Department of Technology Management and Budget

Dollar Range*: 0.00 to 0.00

Status: Active

Roles:

☐ Basic Purchasing
☐ Department Access
☐ Inventory User
☐ Accounts Payable

Approval Doc/Doc Sub Types

☐ Requisition
☐ Inventory
☐ Demand
☐ Open
☐ Market
☐ RPA
☐ Release

☐ Unposted Bid
☐ Blanket
☐ Contract
☐ Open
☐ Market

☐ Evaluated Bid
☐ Blanket
☐ Contract
☐ Open
☐ Market

☐ Purchase Order
☐ Blanket
☐ Contract
☐ Direct Open
☐ Market
☐ Open Market
☐ RPA
☐ G2B Blanket
☐ Release

☐ PO Change Order

Approvers

Approver User	Level	Type
<div></div>	<div></div>	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate
<div></div>	<div></div>	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate

If you don't select any roles(doc type/doc sub types), the approval path will be associated with all the roles(doc type/doc sub types).

Save & Continue

Reset